



Podium inWEALTH SA

As you work hard to accumulate wealth, you often have too little time to actively manage it. Sometimes you only have enough time to react to opportunities or threats as they arise. In most cases, your assets are in several countries spread between various financial institutions, and you spend a great deal of time trying to understand your overall position. You would like a consolidated view, but are not prepared to disclose your full personal, legal, financial and banking details to any of your individual advisors. This is where our independent consultants at Podium inWEALTH can assist. We can work with you to adopt a consistent approach to the regular review of your financial affairs.

Podium inWEALTH SA based in Zurich is a joint venture between the Intrust Group and the Podium Group and together they provide a complete service to clients requiring financial, legal and tax consultancy, corporate and family office services, Wealth-Check™, asset management and investment consulting.

Consultancy Services

- Domestic and international tax planning for individuals and companies
- Legal advisory services - international business, commercial, sports and media law
- VAT consultancy
- Aircraft and pleasure vessel consultancy
- Real estate investments in Europe

Corporate Services

- Incorporation of companies in over 120 jurisdictions via our global network
- Company management and administration
- Book-keeping, accounting and tax compliance
- VAT registration and compliance
- Banking and documentary credit facilities

Family Office Services

- Establishment of trusts and foundations in a variety of jurisdictions
- Provision of trustee services
- Residency and work permit solutions
- Succession and estate planning
- Handling of Swiss and cross-border legal and tax issues
- Property search, investment and management

Wealth-Check™

The goal of Wealth-Check™ is to provide you with a comprehensive global wealth review of your bankable and non-bankable assets and liabilities. The services provided by our fully qualified multilingual professionals are as follows:

- **Consolidation:** an overview of assets and liabilities across investment managers and their respective performance attribution
- **Asset Allocation:** optimization and monitoring of asset allocation according to your needs and risk profile
- **Risk Management:** identification and control of risk exposure
- **Cost Optimization:** optimization of cost versus performance

Asset Management & Investment Consulting

- Appropriate investment decision making based on your risk profile
- Optimization of the use of traditional and modern financial instruments to increase the return of your portfolio by reducing risks and volatility
- Access to an international platform of investment opportunities
- Offer a wide range of solutions for investments in funds and structured products
- Access to special or tailor-made investment vehicles
- Facilitation of investment advice and manager selection
- Facilitation of introductions to private banks

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